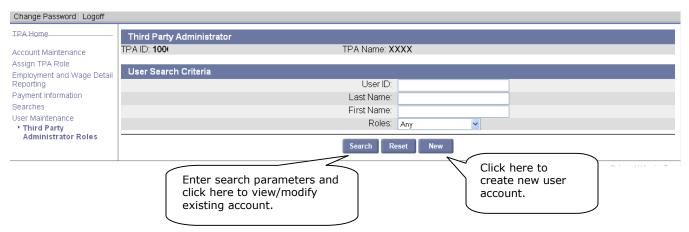# USER MAINTENANCE

Introduction	This section of the document will explain how an authorized user can create new or modify existing TPA user accounts. Within each TPA user account, role assignment allows you to specify the level of access for the TPA user account.

Step-by-Step Instructions:

CREATE TPA USER ACCOUNT:

1. Navigate to the TPA home page/splash page. If required, please refer to the section on 'Navigating to TPA Home page/Splash Page'.

2. Click on the link 'Third Party Administrator Roles'. The following page will appear.

Enter search parameters and click here to view/modify existing account.

Click here to create new user account.

3. Click on 'New'. The following page will appear. Enter the required information and click on 'Save'

4. The new user account will be created and the login credentials will be emailed to the email address provided in step 3. The following page will appear confirming the same.

| Change Password | Logoff |

Third Party Administrator
TPA ID: **100**   TPA Name: **XXXX**

Password Link Sent
An eMail message has been sent to the user containing an encrypted link which that user can use to login to the system and establish a password.

Note: This password link will only be effective for the next **2 hours**.

[Next]

TPA Home
Account Maintenance
Assign TPA Role
Employment and Wage Detail Reporting
Payment Information
Searches
User Maintenance
‣ Third Party Administrator Roles

5. Please refer to the section below, for instructions to assign roles to the newly created TPA user account. This step is required; otherwise, the user will not be able to perform any functions using the newly created account.

MODIFY TPA USER ACCOUNT:

1. Follow the first two steps outlined in the instructions to create a new TPA account.

2. Click on 'Search', after entering search parameters. The following page will appear with the search results. Click on the user ID to continue.

| Change Password | Logoff |

TPA Home
Account Maintenance
Assign TPA Role
Employment and Wage Detail Reporting
Payment Information
Searches
User Maintenance
‣ Third Party Administrator Roles

Third Party Administrator
TPA ID: **100C**   TPA Name: **XXXX**

User Search Criteria
User ID: tk501
Last Name:
First Name:
Roles: Any

[Search] [Reset] [New]

User Search Results

User ID	Last Name	First Name	Eff. Start	Eff. End
tk501	K	Tom	11/19/2009	

Click here to view/modify this user account.

3. The following page will appear, providing a list of account modification options.

TPA User Guide

Screen 1

Change Password | Logoff

TPA Home
- Account Maintenance
- Assign TPA Role
- Employment and Wage Detail Reporting
- Payment Information
- Searches
- User Maintenance
  - ‣ Third Party Administrator Roles

Third Party Administrator
TPA ID: **100**   TPA Name: **XXXX**

User Details
User Type:	**Agent**
User ID:	**tk501**
First Name:	**Tom**
Middle Initial:	
Last Name:	**K**
Telephone:	
eMail:	
Employee ID[?]	
PIN Code[?]	**2135**
Effective Start Date:	**11/19/2009**
Effective End Date:	
Last Logged On:	**11/22/2009**
Incorrect Password Attempts:	**0**
Account Status:	**Active**
Security Question:	**What was the name of the street you grew up on?**
Security Answer:	**s**

> List of account modification options - with brief descriptions.

Modify User Attributes
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Inactivate	Inactivate the user's access to the system.

[Previous]

4. Modify: Click on 'Modify' in step 3. The following page will appear. Enter your changes and click 'Save' to confirm the changes.

Screen 2

Change Password | Logoff   * Indicates Required Field

TPA Home
- Account Maintenance
- Assign TPA Role
- Employment and Wage Detail Reporting
- Payment Information
- Searches
- User Maintenance
  - ‣ Third Party Administrator Roles

Third Party Administrator
TPA ID: **100(**   TPA Name: **XXXX**

User Details
User Type:	**Agent**
User ID:	**tk501**
First Name:	[Tom] *
Middle Initial:	[ ]
Last Name:	[K] *
Telephone:	[ ] ext: [ ]
eMail:	[ ] *
Employee ID[?]	[ ] *
4-digit PIN Code[?]	[2135]
Effective Start Date:	**11/19/2009**
Effective End Date:	[ ]
Last Logged On:	**11/22/2009**
Incorrect Password Attempts:	**0**
Account Status:	**Active**
Security Question:	**What was the name of the street you grew up on?**
Security Answer:	**s**

Previous Comments
[ ]

New Comments
[ ]

[Save] [Cancel]

5. Click on 'Roles' in step 3. The following page will appear. Use the checkboxes to assign available roles/remove exiting roles. Click on 'Save' to confirm the changes.

Change Password | Logoff

TPA Home

Account Maintenance
Assign TPA Role
Employment and Wage Detail Reporting
Payment Information
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User Maintenance
  ‣ Third Party
    Administrator Roles

Third Party Administrator
TPA ID: 100   TPA Name: XXXX

Assign Roles To User
User Type: **Agent**
User ID: **tk501**
Name: **Tom K**

Current Roles Assigned to User
Remove
☐ **TPA User**
  Description: TPA User
☐ **System Administrator**
  Description: TPA System Administrator

Available Roles
No records found...

Save   Cancel

6. Click on 'Reset Password' in step 3. The following page will appear. A warning message will be displayed indicating that you are about to reset the password. Click on 'Confirm' to continue. An email message will be sent to the user with the instructions to reset the password.

Change Password | Logoff

TPA Home

Account Maintenance
Assign TPA Role
Employment and Wage Detail Reporting
Payment Information
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    Administrator Roles

Third Party Administrator
TPA ID: **100**   TPA Name: **XXXX**

Reset Password
Are you sure that you wish to reset the password for: tk501
This action will cause the system to send a secure link to the user's eMail address for the user to click and create a new password.

Confirm   Cancel

7. Click on 'Inactivate' in step 3. The following page will appear. A warning message will be displayed that you are about to inactivate the account. Click 'Confirm' to proceed.

Change Password | Logoff

TPA Home

Account Maintenance
Assign TPA Role
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Third Party Administrator
TPA ID: **100**   TPA Name: **XXXX**

Inactivate User
Are you sure that you wish to inactivate the user: **tk501**

Confirm   Cancel

8. The following page will be displayed. The account status will read – 'User Inactivated'. If you wish to revive the account in the future, click on 'Reactivate' and follow the prompts to re-activate the account.

Change Password	Logoff

TPA Home

Account Maintenance
Assign TPA Role
Employment and Wage Detail Reporting
Payment Information
Searches
User Maintenance
  ▸ Third Party
     Administrator Roles

Third Party Administrator

TPA ID: **100**   TPA Name: **XXXX**

User Details

User Type:	**Agent**
User ID:	**xx505**
First Name:	**X**
Middle Initial:	
Last Name:	**X**
Telephone:	
eMail:	**@detma.org**
Employee ID?	**2135**
PIN Code?	**2135**
Effective Start Date:	**11/22/2009**
Effective End Date:	**11/22/2009**
Last Logged On:	
Incorrect Password Attempts:	**0**
Account Status:	**User inactivated**
Security Question:	
Security Answer:	

Modify User Attributes

Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Reinstate	Reinstate the user's access to the system.

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> In the future, click here to re-activate the account if required.